

Message Text

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UNCLAS SECTION 1 OF 3 STOCKHOLM 1069

FOR BIC/OIM/AJCAYA

E.O. 11652: N/A

TAGS: BEXP, BGEN, SW

SUBJECT: COMMERCIAL PROGRAM: COUNTRY COMMERCIAL PROGRAM (CCP)
FOR SWEDEN FOR FY'77.

REF: 1) A-9106; 2) STOCKHOLM A-63; 3) STOCKHOLM 0758

SUMMARY

1. ASSUMING NO SIGNIFICANT GOS COMMERCIAL/ECONOMIC
POLICY SHIFTS ADVERSE TO US COMMERCIAL GOALS, FY'UU
CCP COMPRISES TEN PRODUCT CAMPAIGNS FOCUSING LARGELY
ON US TRADE CENTER AND TWO OTHER PRIORITY PROJECTS -
INVEST IN USA AND VIP/GROUP FOREIGN BUYERS CAMPAIGNS.

2. ASSUMING PER ASSIGNMENTS AT FY'75 AND FY'76 LEVELS,
WE ROUND OUT PERSONNEL RESOURCE ALLOCATION AT
1,400 MAN-DAYS FOR CAMPAIGN AND 2,700 FOR NON-CAMPAIGN
ACTIVITIES FOR TOTAL MISSION ECONOMIC/COMMERCIAL PER
ALLOCATION THROUGHOUT FY'77 OF 4,100 MAN-DAYS.

3. CONTINGENT UPON THE AVAILABILITY OF FUNDS, THE CCP
ASSUMES APPROXIMATELY \$49,000 AVAILABLE FOR LOCALLY
CONTROLLED EXPENDITURES (FACTORING IN FORESEEN PRICE
INCREASES AND INFLATION) WITH APPROXIMATELY \$5,000
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ALLOCATED TO CAMPAIGN AND \$44,000 TO NON-CAMPAIGN

ACTIVITIES. PER AND LOCALLY CONTROLLED ESTIMATES DO NOT INCLUDE USDOC-BIC/OIM INPUTS.

4. I - OVERVIEW - WE ANTICIPATE THAT COMMERCIAL RELATIONS BETWEEN SWEDEN AND US WILL REMAIN GOOD THROUGHOUT FY'77. IN THIS CONTEXT, OUR PRIMARY COMMERCIAL OBJECTIVE WILL BE TO INCREASE US EXPORTS TO SWEDEN FOCUSED, IN LARGE MEASURE, ON THE CONTRIBUTION OF THE US TRADE CENTER. OUR ASSESSMENT OF ECONOMIC TRENDS IS THAT THERE WILL BE A SLACKENING IN SWEDISH BUSINESS ACTIVITY IN CY 1976 AND AN UPTURN THEREAFTER. FY '77 CCP IS DESIGNED TO INCREASE OUR SHARE OF THE SWEDISH MARKET. EVENT AND NON-CAMPAIGN PROGRAMS WILL BE FOCUSED ON POTENTIAL SALES EXPECTED FROM RISING PRIVATE CAPITAL INVESTMENTS IN SWEDEN AND ABROAD.

II. SUMMARY OF PROGRAM ACTIVITIES.

1. PRODUCT CAMPAIGNS

5. 1.1 BUSINESS EQUIPMENT; CAMPAIGN MANAGER:

J.D. BONEY.

BUSINESS EQUIPMENT IS INCLUDED IN USDOC'S TARGET INDUSTRIES PRIMARY PROMOTION PHASE IN FY'77. MARKET RESEARCH UNDERWAY DURING EARLY 1975 ON THIS THEME WILL PROVIDE THE INFORMATION BASE. RECENT CHANGES OF THE DOLLAR'S VALUE VIS A VIS THE SWEDISH KRONA HAVE MADE U.S. BUSINESS MACHINES VERY PRICE COMPETITIVE IN ADDITION TO THEIR LONG STANDING TECHNICAL COMPETITIVENESS. THE MAJOR FOCUS OF THE CAMPAIGN IS PLANNED TO BE A BUSINESS MACHINES EXHIBITION IN OCTOBER.

EXPECTED RESULTS: AN INCREASE IN THE SWEDISH MARKET SHARE FOR U.S. PRODUCTS; 20 NTM AND 15 OTM AMERICAN COMPANIES EXHIBITING TO THE NORDIC MARKETS; 15 AGENCY AGREEMENTS SIGNED; AT LEAST 22 TRADE OPPORTUNITIES GENERATED; 6 BETWEEN SHOW PROMOTIONS HELD, AND 7 ADS REQUESTS PROCESSED.

6. 1.2 FOOD PROCESSING AND PACKAGING EQUIPMENT:

CAMPAIGN MANAGER: J.D. BONEY.

FOOD PROCESSING/PACKAGING EQUIPMENT IS INCLUDED ON UNCLASSIFIED

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USDOC'S LIST OF TARGET INDUSTRIES FOR PRIMARY PROMOTION IN FY'77. AS 85 PERCENT OF SWEDEN'S RETAIL FOOD MARKETING IS SELF-SERVICE, AND ALTHOUGH THE RAPID EXPANSION TO THIS LEVEL HAS NECESSITATED HEAVY INVESTMENT ALREADY IN MODERN PACKAGING EQUIPMENT, THERE CONTINUES TO BE GOOD OPPORTUNITIES FOR MORE EFFICIENT TRANSPORT PACKAGING AND FOR ADVANCED FOOD PROCESSING EQUIPMENT. THE MAJOR EVENT PLANNED IN THIS CAMPAIGN IS A FOOD PRO-

CESSING AND PACKAGING EQUIPMENT EXHIBITION IN NOVEMBER.
(N.B. EXHIBITION MUST EMPHASIZE EQUIPMENT SCALED TO NORDIC
MARKETS).

7. EXPECTED RESULTS: AN INCREASE IN THE MARKET SHARE FOR
U.S. PRODUCTS; 15 NTM AND 13 OTM AMERICAN COMPANIES
EXHIBITING TO THE NORDIC MARKETS; 10 AGENCY AGREEMENTS
SIGNED; AT LEAST 14 TRADE OPPORTUNITIES GENERATED,
4 BETWEEN SHOW PROMOTIONS HELD, 5 ADS'S PROCESSED, AND
ONE LICENSING OPPORTUNITY REPORTED.

8. 1.3 ENVIRONMENTAL CONTROL EQUIPMENT;
CAMPAIGN MANAGER: V.E. OLSON.
WATER PURIFICATION AND POLLUTION CONTROL EQUIPMENT
EQUIPMENT

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IS INCLUDED ON USDOC'S LIST OF TARGET INDUSTRIES FOR
PRIMARY PROMOTION IN FY'77. THE ENVIRONMENT-CONSCIOUS
NORDIC COUNTRIES CONTINUE TO PRESENT GOOD MARKETS FOR
NEW EQUIPMENT AND TECHNOLOGY IN ALL TYPES OF ENVIRON-
MENTAL CONTROL. A HIGHLY VERTICAL EXHIBITION IN ONE
ELEMNT OF THAT THEME, I.E. A) AIR MONITORING;
B) WASTE WATER TREATMENT AND OIL SPILL EQUIPMENT;
OR C) SOLID WASTE TREATMENT EQUIPMENT, IS PLANNED
FOR JUNE AS THE MAJOR FOCUS OF THE CAMPAIGN.
EXPECTED RESULTS; AN INCREASE IN THE MARKET SHARE FOR
U.S. PRODUCTS ; 15 NTM AND 15 OTM AMERICAN COMPANIES

EXHIBITING TO THE NORDIC MARKETS; 10 AGENCY AGREEMENTS SIGNED; AT LEAST 17 TRADE OPPORTUNITIES GENERATED; 4 BETWEEN SHOW PROMOTIONS HELD, 7 ADS'S PROCESSED; AND TWO LICENSING OPPORTUNITIES REPORTED.

9. 1.4 SECURITY SYSTEMS; CAMPAIGN MANAGER: T. RUMME
MARKET/PRODUCT ANALYSIS FOLLOWING PREVIOUS SHOWSRELATED TO THIS THEME HAVE EMPHASIZED THE GOOD MARKET AND INTEREST IN SECURITY SYSTEMS. IN PARTICULAR, STOCKHOLM A-28 RECOMMENDS THAT MARKET RESEARCH BE DONE WITH A VIEW TO HOLDING A FULL EXHIBITION IN FY'77. AN EXHIBITION IS PLANNED FOR JANUARY.
EXPECTED RESULTS: AN INCREASE IN THE MARKET SHARE FOR U.S. PRODUCTS; 15 NTM AND 12 OTM AMERICAN COMPANIES EXHIBITING TO THE NORDIC MARKETS; 10 AGENCY AGREEMENTS
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SIGNED; AT LEAST 12 TRADE OPPORTUNITIES GENERATED, 4 BETWEEN SHOW PROMOTIONS HELD, 7 ADS'S PROCESSED, AND TWO LICENSING OPPORTUNITIES REPORTED.

10. 1.5 ELECTRONIC DATA PROCESSING EQUIPMENT (WITH EMPHASIS ON DATA GRAPHICS); CAMPAIGN MANAGER: COMMERCIAL ATTACHE.
ELECTRONIC DATA PROCESSING EQUIPMENT IMPORTS TO SWEDEN ARE RAPIDLY INCREASING WITH \$104.3 MILLION IN 1973. DATA GRAPHICS IS A SPECIALIZED AND INCREASINGLY IMPORTANT SEGMENT OF EDP IN WHICH THE U.S. IS THE TECHNOLOGICAL PACESETTER. A CAMPAIGN DIRECTED AT DATA GRAPHICS WILL MAINTAIN CONTACT, EDUCATE, AND STIMULATE THE MARKET. AN EXHIBITION OF DATA GRAPHICS IN FEBRUARY IS PLANNED AS THE CENTER OF THE CAMPAIGN.
EXPECTED RESULTS: AN INCREASE IN THE NORDIC COUNTRIES MARKET SHARES FOR EDP PRODUCTS FROM THE U.S.; 15 NTM AND 15 OTM AMERICAN COMPANIES EXHIBITING TO THE NORDIC MARKETS; 12 AGENCY AGREEMENTS SIGNED; AT LEAST 15 TRADE OPPORTUNITIES GENERATED, 5 BETWEEN SHOW PROMOTIONS HELD, 7 ADS'S PROCESSED, AND ONE LICENSING OPPORTUNITY REPORTED.

11. 1.6 ENERGY SYSTEMS; CAMPAIGN MANAGER: V.E. OLSON.
ENERGY SYSTEMS ARE ONE OF THE USDOC TARGET INDUSTRIES FOR INTENSIVE PROMOTION IN FY'77. THE SWEDISH GOVERNMENT IS PLANNING MAJOR EXPENDITURES IN ENERGY SOURCE DEVELOPMENT, EVENTS IN WHICH THE POST WILL BE FOLLOWING CLOSELY. THE POST WILL ALSO BE CONCENTRATING ON FOLLOW-UP TO THE ENERGY SYSTEMS EXHIBITION HELD AT THE END OF FY'76.

12. EXPECTED RESULTS: AN INCREASE IN THE NORDIC MARKET

SHARES FOR ENERGY SYSTEMS EQUIPMENT AS WELL AS A
LARGE PORTION OF NEW MAJOR INVESTMENT PROJECTS; 3 NTM
AND 3 OTM AMERICAN MANUFACTURERS PRODUCTS FEATURED IN
6 BETWEEN SHOW PROMOTIONS; 3 AGENCY AGREEMENTS SIGNED;
13 TRADE OPPORTUNITIES GENERATED; 5 ADS REQUESTS PRO-
CESSED; ONE LICENSING OPPORTUNITY REPORTED.

13. 1.7 LABORATORY INSTRUMENTS; CAMPAIGN MANAGER:
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T. RUMME.

LABORATORY INSTRUMENTATION IS INCLUDED AS A
USDOC TARGET INDUSTRY RANGE (TIR) FOR INTENSIVE PRO-
MOTION IN FY'77. THE MARKET IN SWEDEN IS EXPECTED TO
INCREASE ANNUALLY BY 17 PERCENT THROUGH 1979. SWEDISH
DEPENDENCE ON IMPORTS WILL CONTINUE AND THE U.S. SHARE
OF THOSE IMPORTS IS EXPECTED TO INCREASE DUE TO U.S.
DOMINANCE IN THE EXPANDING FIELD OF ELECTRONIC
LABORATORY INSTRUMENTS. AS A FOLLOW UP TO A MAJOR
EXHIBITION ON THIS THEME IN FY'76 THE POST WILL CON-
CENTRATE ON BETWEEN SHOW PROMOTIONS AND NEW TRADE
OPPORTUNITIES.

14. EXPECTED RESULTS: AN INCREASE IN THE NORDIC MARKET
SHARES FOR U.S. LABORATORY INSTRUMENTS; 3 NTM AND
4 OTM AMERICAN MANUFACTURERS PRODUCTS FEATURED IN
7 BETWEEN SHOW PROMOTIONS; 3 AGENCY AGREEMENTS
SIGNED; 14 TRADE OPPORTUNITIES GENERATED; 7 ADS
REQUESTS PROCESSED; TWO LICENSING OPPORTUNITIES
REPORTED.

15. 1.8 HIGH TECHNOLOGY CONSUMER GOODS;
CAMPAIGN MANAGER: V.E. OLSON.
SWEDISH RETAIL SALES HAVE BEEN INCREASING AT A
FASTER RATE THAN PRICES INDICATING A CONTINUING
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HIGH PROPENSITY TO CONSUME. WITH THE PURCHASING POWER OF SWEDISH CURRENCY STEADILY INCREASING IN TERMS OF THE U.S. \$, MORE AND MORE U.S. CONSUMER GOODS, ESPECIALLY THOSE INCORPORATING HIGH TECHNOLOGY (WHICH ARE ALREADY HIGHLY REGARDED BY THE MARKET), WILL BE MORE PRICE COMPETITIVE. THIS CAMPAIGN ATTEMPTS TO CAPITALIZE ON THESE CIRCUMSTANCES AND WILL FOCUS ON A JEEP PROMOTION IN OCTOBER.

16. EXPECTED RESULTS; INCREASING IMPORT SALES AND MARKET PENETRATION FOR U.S. HIGH TECHNOLOGY CONSUMER GOODS IN THE NORDIC MARKETS; 8 NTM AND 3 OTM AMERICAN FIRMS FEATURED IN JEEP OR BSP EVENTS; 6 AGENCY AGREEMENTS SIGNED; 55 TRADE OPPORTUNITIES GENERATED; 20 ADS REQUESTS PROCESSED.

17. 1.9 HIGH PERFORMANCE MATERIALS:
CAMPAIGN MANAGER: J.D. BONEY
SWEDEN'S INDUSTRY IS CONSISTENTLY
IN THE VANGUARD IN APPLICATION OF NEW TECHNOLOGY TO MANUFACTURING PROCESSES AND PRODUCTS. CONSEQUENTLY THE POST BELIEVES MARKET RESEARCH WILL CONFIRM A STEADILY INCREASING DEMAND FOR HIGH PERFORMANCE MATERIALS IN WHICH THE U.S. IS A LEADING SOURCE. THIS CAMPAIGN WILL BE SUPPORTED BY A HIGH PERFORMANCE MATERIALS JEEP IN DECEMBER.
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18. EXPECTED RESULTS: AN INCREASE IN THE NORDIC MARKET SHARES AS WELL AS VALUE INCREASE FOR U.S. EXPORTS; 10 AMERICAN COMPANIES EXHIBITING HPM IN THE NORDIC MARKETS; 6 AGENCY AGREEMENTS SIGNED; AT LEAST 6 TRADE OPPORTUNITIES GENERATED, 2 BETWEEN SHOW PROMOTIONS HELD, 5 ADS REQUESTS PROCESSED, AND ONE LICENSING OPPORTUNITY REPORTED.

19. 1.10 PULP, PAPER AND CONVERTING EQUIPMENT;
CAMPAIGN MANAGER: J.D. BONEY.
THE PULP AND PAPER INDUSTRY IS LONG ESTABLISHED IN
FINLAND, SWEDEN AND NORWAY AS IS THE CONVERTING
INDUSTRY IN DENMARK AND THEY ARE EFFICIENT AND
ADVANCED IN TECHNOLOGY. MUCH U.S. EQUIPMENT IS ALREADY
STANDARD IN THE INDUSTRY AND NEW TECHNOLOGY IS
SOUGHT OUT. IN VIEW OF THIS THE POST WILL MAKE EVERY
EFFORT TO INTRODUCE NEW TECHNOLOGY AS QUICKLY AS
POSSIBLE WITH A VIEW TO INCREMENTAL SALES AND WILL
CONCENTRATE ON CONTINUING GOOD RELATIONS WITH THE
INDUSTRY TO HELP MAINTAIN THE U.S. SHARE OF THE NORDIC
MARKETS FOR STANDARD EQUIPMENT. A JEEP AND SYMPOSIUM
ARE PLANNED FOR MAY TO CENTER ATTENTION ON THIS
INDUSTRY AND THE IMPORTANT END-USERS AND DECISION-
MAKERS THEREIN.

20. EXPECTED RESULTS: A VALUE INCREASE IN U.S. EXPORTS
OF PULP AND PAPER EQUIPMENT WITH PROBABLE INCREMEN-
TAL SALES OF CONVERTING AND PROCESS CONTROL EQUIP-
MENT; 12 U.S. FIRMS EXHIBITING IN THE NORDIC MARKETS;
8 AGENCY AGREEMENTS SIGNED; AT LEAST 8 TRADE OPPORTUNI-
TIES GENERATED, 2 BETWEEN SHOW PROMOTIONS HELD, 6 ADS
REQUESTS PROCESSED, AND TWO LICENSING OPPORTUNITIES
REPORTED.

2. OTHER PRIORITY PROJECTS.

21. 2.1 INVEST IN THE USA; CAMPAIGN MANAGER: COMMERCIAL
ATTACHE, ALTERNATE: T. RUMME.
SWEDISH DIRECT INVESTMENTS IN THE U.S. WERE ESTIMATED
AT \$300 MILLION AT THE END OF 1974. A NUMBER OF
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SWEDISH FIRMS NOW IN DIRECT EXPORTS ARE KNOWN TO BE
INTERESTED IN DIRECT INVESTMENT AND/OR LICENSING
ARRANGEMENTS WITH U.S. FIRMS TO PRODUCE IN THE U.S.
A SEMINAR WILL BE HELD AS THE MAIN THRUST OF THE
CAMPAIGN.

22. EXPECTED RESULTS: 50 POTENTIAL SWEDISH INVESTORS
INVOLVED IN DIALOGUE ON US INVESTMENT POSSIBILITIES;
THREE NEW OR ADD-ON CAPITAL INVESTMENTS MADE; SIX
REVERSE LICENSING OPPORTUNITIES REPORTED.

23. 2.2 VIP AND FOREIGN GROUP BUYERS PROGRAMS;
CAMPAIGN MANAGER: T. RUMME.
ISSUANCE OF B1 AND B2 VISITOR VISAS FOR TRAVEL
TO THE U.S. HAS BEEN STEADILY INCREASING THE LAST

FEW YEARS; 30,000 WERE ISSUED IN 1974. THE ADVANTAGEOUS KRONA/DOLLAR EXCHANGE RATE FOR SWEDISH TRAVELERS AND THE NEW AND HIGH-QUALITY TRAVEL USA MATERIALS AND FILMS, LARGELY SUPPLIED BY USIS, SHOULD BE CAPITALIZED ON TO INCREASE SWEDISH BUSINESS AND HOLIDAY TRAVEL TO THE U.S. TWO SEMINARS WILL BE UTILIZED IN THIS CAMPAIGN.

24. EXPECTED RESULTS: 100 SWEDISH TRAVEL AGENTS AND CARRIER REPRESENTATIVES EXPOSED TO AND PROVIDED WITH TRAVEL USA MATERIAL; FROM 30 - 100 SWEDISH BUSINESSMEN INDUCED TO PARTICIPATE IN AT LEAST SIX EACH VIP AND FOREIGN GROUP BUSINESS TRAVEL PROGRAMS TO MAJOR US VIP EVENTS.

25. 2.3 FOLLOW UP TO THESE FY'76 CAMPAIGNS; PRINTING AND GRAPHIC ARTS; AVIONICS AND AVIATION SUPPORT EQUIPMENT; LASERS AND ELECTRO-OPTICS; METALS EQUIPMENT AND RELATED INDUSTRIESV COMMUNICATIONS EQUIPMENT.

26. III - DETAILS OF ECONOMIC/COMMERCIAL ORGANIZATION CHARTS AND OF RESOURCE ALLOCATION AS WELL AS CAMPAIGN WORKSHEETS FOLLOW BY AIRGRAM.
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